Quick Tips
Assigning E-Grant Security Roles for
IDEA Consolidated Part B and Preschool

Instructions for the LEA assignment of security roles are described in the LEA Security Coordinator Instructions posted on the OPI Web page at:
    http://opi.mt.gov/PDF/ITProjects/EGrants/E-GrantsSecurityInstrV2.pdf.
All E-grant users are required to have a role assigned in order to enter data, modify and approve applications and implement payment processes. This document describes how the security role rules apply to the system, consortia and cooperative applicants for IDEA funds.

- The prime applicant for a <u>system</u> (high school and elementary district combination) or a <u>consortium</u> (multiple school districts) must be an LEA:
    - o The security coordinator must be a district employee.
    - o Assignment of security roles mirrors the process for all other E-grant applications.

- A <u>cooperative</u> can apply for IDEA funds as the prime applicant and fiscal agent.
    - o The cooperative director must designate a security coordinator. The Security Coordinator Application must be completed and faxed to OPI: http://opi.mt.gov/PDF/ITProjects/SecurityCoordinator_App.pdf. The cooperative director may choose to perform the tasks of the security coordinator.
    - o A current LEA security coordinator of a member district participating in a cooperative may also be a <u>member</u> of a cooperative. In this situation, the security coordinator must have two different passwords and IDs; one to gain access to IDEA as a member of the cooperative and another set to gain access on behalf of the cooperative itself.

- The **Planning Tool** (Topic 5 only) must be completed prior to entering information into the IDEA application. The security coordinator must set up planning tool role assignments allowing data entry for the Planning Tool in addition to data entry roles for the IDEA application.

The security coordinator completes assignment of roles as described in the E-Grant Security Instruction document. For IDEA applicants, roles must be assigned for two "Application/System" items from the menu revealed under the Group Org User tab found in the MTW Security System:
    1. IDEA Consolidated
    2. Planning Tool
Roles are assigned using the "Group" dropdown menu. The options available for IDEA are:

1. LEA Auth Rep: Either the district superintendent, county superintendent for small LEAs or cooperative director who will enter and/or approve applications.

2. LEA Business Mgr: Either the district or cooperative financial manager who will enter/approve cash requests and fiscal reports.
3. LEA Data Entry: District staff or cooperative members who will enter information and data into the application.
4. LEA Financial Data Entry: District clerk or cooperative staff who will enter cash requests and fiscal reports.